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COFFEE
FCOF 2-65
April 1965

WORLD COFFEE PRODUCTION ESTIMATE

CHANGES LITTLE SINCE DECEMBER

The Foreign Agricultural Service's fourth estimate of the 1964-65 world coffee crop places total production at 52.3 million bags ^{1/} and exportable production ^{2/} at 37.8 million bags. These estimates are slightly above those of December; they also remain substantially below last year's crop of 68.2 million bags, with 54.2 million bags exportable.

The 1964-65 crop was considerably below world import requirements, however, stocks in producing countries, especially Brazil, were more than adequate to fill the gap. Imports of green coffee into the United States in calendar year 1964 totaled 22.8 million bags, about one million below the 1963 level.

Production

North America: Total coffee production in North America in 1964-65 is now estimated at 10.3 million bags, 7.4 million considered exportable production. The crop is thus down from 1963-64, when total production amounted to 10.8 million bags and exportable 8.1 million. The principal reason for this slight drop was lower outturns in Costa Rica, Guatemala, and Mexico.

Production in Costa Rica in 1964-65 is now estimated down a third from the 1963-64 level, because of a combination of drought, volcanic ash, and insect damage. First indications are that the coming crop (1965-66) will show substantial improvement but will not reach the 1962-63 level. In Guatemala also drought and insect damage were principal reasons for a decline in production in 1964-65. Here, too, prospects are brighter for the next crop.

^{1/} All bags in text and tables equal 132.276 pounds.

^{2/} Exportable production: Total production minus domestic consumption.

GREEN COFFEE: World total production for the marketing year 1964-65 with comparisons 1/

Continent and country	Average 1955/56- 1959-60	1961-62	1962-63	1963-64	4th estimate 1964-65
	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>
North America:					
Costa Rica	734	1,140	1,050	1,100	740
Cuba	713	800	650	475	600
Dominican Republic	549	600	570	675	675
El Salvador	1,436	1,900	1,650	2,000	1,900
Guatemala	1,357	1,700	1,900	1,775	1,600
Haiti	600	725	675	610	625
Honduras	321	365	410	395	420
Mexico	1,716	2,350	2,200	2,900	2,700
Nicaragua	376	440	505	450	525
Panama	<u>3/</u> 27	85	73	85	90
Trinidad & Tobago	44	42	60	75	80
Other <u>4/</u>	427	392	416	314	351
Total North America	8,300	10,539	10,159	10,854	10,306
South America:					
Brazil	28,300	35,000	27,000	26,000	10,000
Colombia	7,360	7,800	7,500	7,800	8,000
Ecuador	521	850	800	700	850
Peru	324	710	770	815	830
Venezuela	835	750	850	890	925
Other <u>5/</u>	63	101	124	128	123
Total South America	37,403	45,211	37,044	36,333	20,728
Africa:					
Angola	1,443	2,800	3,100	2,800	3,100
Burundi <u>6/</u>	---	---	300	150	200
Cameroon <u>7/</u>	405	835	825	900	950
Central African Republic	<u>3/</u> 41	145	105	185	150
Congo (Leopoldville)	1,195	900	1,100	1,100	1,000
Ethiopia	1,100	1,430	1,490	1,575	1,550
Guinea	<u>8/</u> 114	235	215	175	200
Ivory Coast	2,130	1,650	3,350	4,350	3,700
Kenya	415	525	635	740	850
Malagasy Republic	902	800	1,000	900	1,000
Ruanda-Urundi <u>9/</u>	<u>10/</u> 120	460	---	---	---
Rwanda <u>6/</u>	---	---	200	125	125
Tanzania <u>11/</u>	375	400	470	575	575
Togo	122	172	177	230	225
Uganda	1,508	1,945	2,945	2,800	2,900
Other <u>12/</u>	332	316	400	429	431
Total Africa	10,202	12,613	16,312	17,034	16,956
Asia and Oceania:					
India	712	765	930	1,145	1,100
Indonesia	1,343	1,850	2,330	1,900	2,200
Philippines	199	680	550	550	560
Yemen	88	90	82	80	80
Other <u>13/</u>	179	295	280	319	337
Total Asia and Oceania	2,521	3,680	4,172	3,994	4,277
World total production	58,426	72,043	67,687	68,215	52,267

1/ The coffee marketing season begins during the second half of the calendar year, starting in some countries like Brazil as early as July 1 and in other countries about October 1. 2/ 132,276 pounds each. 3/ 2-year average. 4/ Includes Guadeloupe, Hawaii, Jamaica, Martinique, and Puerto Rico. 5/ Includes Bolivia, British Guiana, Paraguay, and Surinam. 6/ Prior to 1962-63 shown as Ruanda-Urundi. 7/ Beginning with 1961-62 includes West Cameroon. Prior to 1961-62 this area was identified as Southern Cameroon and its production was included with Nigeria. 8/ 3-year average. 9/ Prior to 1959-60, Ruanda-Urundi shown in Congo (Leopoldville). Beginning 1962-63 shown as Burundi and Rwanda. 10/ 1 year only. 11/ Prior to 1964-65 year was shown as Tanganyika. Now includes Zanzibar as well. 12/ Includes Cape Verde, Comores Islands, Dahomey, Gabon, Ghana, Liberia, Nigeria, Republic of Congo, Sao Tome and Principe, Sierra Leone, and Spanish Guinea. 13/ Includes Malaysia, New Caledonia, New Hebrides, Papua and New Guinea, Portuguese Timor and Vietnam.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of Agricultural Attaches and Foreign Service Officers, results of office research and related information.

GREEN COFFEE: World exportable production for the marketing year 1964-65 with comparisons 1/

Continent and country	Average 1955/56- 1959/60	1961-62	1962-63	1963-64	4th estimate 1964-65
	1,000 bags 2/	1,000 bags 2/	1,000 bags 2/	1,000 bags 2/	1,000 bags 2/
North America:					
Costa Rica	658	1,025	930	970	600
Cuba	207	200	50	---	---
Dominican Republic	421	450	420	525	525
El Salvador	1,327	1,800	1,540	1,885	1,780
Guatemala	1,158	1,500	1,700	1,565	1,390
Haiti	435	525	425	365	380
Honduras	262	290	335	320	340
Mexico	1,369	1,500	1,250	1,950	1,700
Nicaragua	334	395	460	405	480
Panama	3/ 10	40	19	26	27
Trinidad & Tobago	37	35	53	68	72
Other 4/	171	88	122	55	63
Total North America	6,389	7,848	7,304	8,134	7,357
South America:					
Brazil	23,360	28,000	20,000	19,000	3,000
Colombia	6,550	6,800	6,500	6,800	6,900
Ecuador	422	650	570	460	600
Peru	251	570	605	630	630
Venezuela	472	310	370	395	425
Other 5/	44	50	73	77	72
Total South America	31,099	36,380	28,118	27,362	11,627
Africa:					
Angola	1,427	2,750	3,050	2,750	3,045
Burundi 6/	---	---	295	145	195
Cameroon 7/	396	820	805	875	920
Central African Republic	3/ 37	140	100	180	145
Congo (Leopoldville)	1,164	850	1,050	1,050	950
Ethiopia	850	1,100	1,150	1,225	1,200
Guinea	8/ 105	220	200	160	185
Ivory Coast	2,063	1,600	3,300	4,300	3,650
Kenya	399	505	615	720	830
Malagasy Republic	812	700	900	800	900
Ruanda-Urundi 9/	10/ 118	390	---	---	---
Rwanda 6/	---	---	195	120	120
Tanzania 11/	369	390	455	560	560
Togo	121	170	175	225	220
Uganda	1,454	1,933	2,930	2,785	2,885
Other 12/	308	284	367	396	397
Total Africa	9,623	11,852	15,587	16,291	16,202
Asia and Oceania:					
India	223	315	370	600	555
Indonesia	1,120	1,650	2,080	1,600	1,850
Philippines	---	---	---	---	---
Yemen	74	80	72	70	70
Other 13/	63	150	135	139	147
Total Asia and Oceania	1,480	2,195	2,657	2,409	2,622
World exportable production	48,591	58,275	53,666	54,196	37,808

1/ The coffee marketing season begins during the second half of the calendar year starting in some countries like Brazil as early as July 1 and in other countries about October 1. Exportable production represents total production minus consumption, except for Brazil prior to 1959-60 which was based on "registrations" of current crop minus port consumption and coastwise shipments. 2/ 132,276 pounds each. 3/ 2-year average. 4/ Includes Guadeloupe, Hawaii, Jamaica, and Puerto Rico. 5/ Includes Bolivia, British Guiana, Paraguay and Surinam. 6/ Prior to 1962-63 shown as Ruanda-Urundi. 7/ Beginning with 1961-62 includes West Cameroon. Prior to 1961-62 this area was identified as Southern Cameroon and its production was included with Nigeria. 8/ 3-year average. 9/ Prior to 1959-60, Ruanda-Urundi shown in Congo (Leopoldville). Beginning 1962-63 shown as Burundi and Rwanda. 10/ 1 year only. 11/ Prior to 1964-65 year was shown as Tanganyika. Now includes Zanzibar as well. 12/ Includes Cape Verde, Comores Islands, Dahomey, Gabon, Ghana, Liberia, Nigeria, Republic of Congo, Sao Tome and Principe, Sierra Leone, and Spanish Guinea. 13/ Includes Malaysia, New Caledonia, New Hebrides, Papua and New Guinea, Portuguese Timor and Vietnam.

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In Mexico, a hurricane hit the State of Chiapas during January, damage from which is not yet fully assessed; however, it appears that this year's production will be about 100,000 bags below previous estimates. This would mean about a 7-percent drop from 1963-64.

Total production in Nicaragua is expected to be up considerably in 1964-65 and exportable production in excess of that country's International Coffee Agreement (ICA) quota. A recently established Nicaraguan Coffee Institute will apply retention quotas and store excess coffee, it is planned.

South America: In South America total production in 1964-65 is now estimated at 20.7 million bags, exportable at 11.6 million. The drop was caused by the small crop in Brazil, where drought, frost, and fires took a heavy toll. Total and exportable production in South America in 1963-64 were 36.3 and 27.4 million bags, respectively.

The USDA's estimate of 1964-65 production in Brazil remains at 10.0 million bags. Here, exportable production is estimated at 3.0 million bags, even though most of the crop is expected to be of exportable quality. Hence, there should be a substantial reduction in Brazilian coffee stocks if that country ships its entire 1964-65 export quota as allotted by the International Coffee Organization (ICO) under the provisions of the ICA. The coming exportable crop, however, is expected to be large enough for Brazil to export its quota under the agreement without drawing from stocks.

An increase in production in Colombia is expected to be largely offset by increasing domestic consumption. Increased production is largely the result of continually improving cultural practices, including greater use of fertilizer and of improved varieties. Peru's production is now expected to be a little higher than previously forecast; at least as large a crop is indicated for the coming year, as well. Production is creeping upward in Venezuela also, but this is being offset by similar increases in domestic consumption.

Africa: Total 1964-65 production in Africa is now estimated at 17.0 million bags, of which 16.2 million is exportable. Both of these figures are at approximately the same levels as in 1963-64. Actually, production is estimated to have fallen off slightly.

Production in Angola remains as estimated in December, but for Cameroon estimates are now greater. Problems encountered in harvesting the 1964-65 Congo (Leopoldville) crop are responsible for a lower-than-expected outturn in that country.

Ethiopian production in 1964-65 remains as estimated earlier, while 1963-64 production appears to have been slightly higher than previously thought. The Ivory Coast's 1964-65 crop, although larger than previously estimated, is still expected to be down almost 15 percent from last year. Kenya's crop is also up slightly from December estimates. There has been little change in the production situation in the rest of Africa.

Asia and Oceania: Total and exportable production in the area in 1964-65 are still estimated at 4.3 and 2.6 million bags, respectively. This is an increase of about 5 percent over 1963-64 caused principally by an increase in Indonesian production.

Other Producing Countries: Exportable production from smaller producing countries in 1964-65 (with comparable 1963-64 data in parentheses), in bags of 132.276 pounds, is estimated as follows: Jamaica 15,000 (17,000); Puerto Rico 25,000 (25,000); Bolivia 20,000 (20,000); Paraguay 40,000 (45,000); Surinam 8,000 (8,000); Dahomey 28,000 (28,000); Gabon 18,000 (17,000); Ghana 48,000 (48,000); Liberia 58,000 (58,000); Nigeria 33,000 (33,000); Congo (Brazzaville) 14,000 (14,000); Sao Tome and Principe 5,000 (5,000); Sierra Leone 80,000 (80,000); Spanish Guinea 110,000 (110,000); New Caledonia 30,000 (30,000); Papua and New Guinea 80,000 (75,000); Portuguese Timor 33,000 (30,000).

World Trade and Developments

Gross imports of green coffee into the United States during 1964 totaled 22,822,316 bags, valued at \$1,197 million. This would indicate an average value of 39.7 cents per pound. Comparative figures for 1963 were 23,836,077 bags, valued at \$955 million, indicating an average value of 30.0 cents per pound. It is perhaps significant that imports into Gulf ports increased in 1964 even though total imports, as well as Atlantic and Pacific port imports, were down. Unofficial figures now available show that these were 36 percent of the total in 1964, as compared to 33 percent in 1963. The biggest increase in the quantity received at Gulf ports was in the imports from Africa, which were 36 percent over 1963, more than offsetting a 13 percent drop in receipts from South America.

Inventories of green coffee in the United States on December 31, 1964, totaled 4,539,000 bags, down slightly from the high of 4,726,000 bags a year earlier, according to the Department of Commerce. This stock level dropped sharply early in 1965, however, when a dock strike blocked imports.

U.S. roastings in 1964, including roastings for soluble use, totaled 22,370,000 bags, down slightly from 22,815,000 bags in 1963. Roastings for soluble use were down for the second year in a row, this time by about 5 percent, to a level of 3,793,000 bags.

Brazil's exports during calendar year 1964 totaled 15.1 million bags, according to the Brazilian Coffee Institute, as compared with 19.4 million in 1963. This was a drop of about 22 percent. Exports during the first 4 months of the 1964-65 marketing year (October-September) were down a third from the same period in 1962-63.

Colombian exports during 1964 totaled 6,410,000 bags, up about 5 percent from the 6,132,000 bags exported in 1963. During the first quarter of the 1964-65 marketing year, exports were almost 7 percent above those during the same period a year earlier.

Coffee prices have remained comparatively stable over the past 2 months, in spite of a dock strike in the United States with a resulting heavy drawdown in stocks. In addition, an action by the International Coffee Agreement in early March, cutting the total world export quota by 4 percent, has not caused any upward trend. Most recent prices have instead tended to be a little softer, especially in future positions.

U.S. retail price of roasted coffee in one-pound cans in the United States was down slightly in January from the December 1964 level, according to preliminary indications, but this price has been quite stable over the past 6 months.

Recently adopted in the International Coffee Council is a new "price indicator" scheme which will bring about an automatic readjustment of quotas whenever an especially calculated average daily price moves out of a certain predetermined price range. Also adopted was a plan to set up an international coffee fund. The purpose of this fund is primarily to help individual producing countries to store surplus production when exports are at such a level that stocks build up.

GREEN COFFEE: Value of exports by specified producing countries,
calendar years 1957-1963 1/

Countries	1957	1958	1959	1960	1961	1962	1963 <u>2/</u>
	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.	Mil.
	U.S.	U.S.	U.S.	U.S.	U.S.	U.S.	U.S.
	dol.	dol.	dol.	dol.	dol.	dol.	dol.
Costa Rica	41	51	40	44	43	48	46
Dominican Republic	25	24	18	23	14	20	19
El Salvador	110	84	71	77	70	74	75
Guatemala	82	78	76	79	69	74	78
Haiti	21	29	15	17	13	21	16
Honduras	12	11	12	12	9	11	14
Mexico	109	79	69	72	73	71	49
Nicaragua	29	24	14	19	17	15	17
Brazil	846	688	733	713	710	643	747
Colombia	390	355	363	334	308	332	303
Ecuador	30	26	18	22	14	21	18
Peru	13	15	16	19	21	24	26
Venezuela	37	40	26	23	22	19	17
Angola	51	54	48	44	48	65	66
Ethiopia	50	34	30	38	43	43	44
Ivory Coast	80	90	65	76	82	77	100
Uganda	62	60	53	48	39	56	76
Kenya	36	33	34	29	29	30	31
Tanganyika	20	22	17	21	19	18	19
India	16	15	13	14	20	16	16
Indonesia	15	7	6	14	14	12	20
Total specified countries	2,075	1,819	1,737	1,738	1,677	1,690	1,797

1/ Coffee exports of specified countries represent around 90 percent of total world exports.

2/ Preliminary.

Foreign Agricultural Service. Compiled from official statistics of foreign governments, reports of Agricultural Attaches and Foreign Service Officers, trade reports, and other related source materials.

GREEN COFFEE: United States Imports, 1960-1964

Continent and country	1960	1961	1962	1963	1964
	<u>Bags 3/</u>	<u>Bags 3/</u>	<u>Bags 3/</u>	<u>Bags 3/</u>	<u>Bags 3/</u>
North America:					
Costa Rica	271,275	369,203	384,573	287,035	292,943
Cuba	227	411	---	---	---
Dominican Republic	403,308	262,708	417,735	367,505	531,792
El Salvador	445,551	582,724	842,728	762,544	682,885
Guatemala	798,092	949,476	966,535	1,079,815	788,844
Haiti	63,878	75,531	154,105	122,271	122,260
Honduras	332,043	144,399	159,645	218,377	200,612
Mexico	1,097,418	1,253,946	1,342,043	810,686	1,425,790
Nicaragua	170,251	224,944	190,494	224,283	170,106
Panama	15,922	5,942	763	27,502	3,316
Other	30,332	46,899	19,725	37,396	39,488
Total North America	3,628,297	3,916,183	4,478,346	3,937,414	4,258,036
South America:					
Brazil	9,260,842	8,576,091	9,091,956	9,265,380	7,212,321
Colombia	4,254,415	4,078,426	4,330,463	3,939,738	3,698,949
Ecuador	316,889	202,222	369,209	293,615	230,381
Peru	346,908	382,482	474,370	490,738	541,253
Venezuela	344,642	343,976	271,510	312,686	261,652
Other	75,055	43,109	34,795	35,256	45,133
Total South America	14,598,751	13,626,306	14,572,303	14,337,413	11,989,689
Africa:					
Angola	802,329	1,024,401	1,483,337	1,121,705	1,230,823
British East Africa	934,051	1,246,232	1,387,960	1,497,122	1,382,291
Cameroon	35,560	70,994	123,633	120,640	151,421
Congo (Leopoldville)	644,566	592,532	497,322	447,985	196,189
Ethiopia	581,739	679,191	660,583	815,398	923,759
Ivory Coast	657,207	735,857	606,849	705,636	1,191,664
Malagasy Republic	83,021	113,957	164,719	207,079	169,604
Other	85,925	115,924	170,370	145,495	824,817
Total Africa	3,824,398	4,579,088	5,094,773	5,061,060	6,070,568
Asia and Oceania:					
India	7,861	47,357	11,779	23,893	76,458
Indonesia	19,113	138,002	301,436	453,939	391,760
Other	22,516	23,344	20,710	21,358	34,308
Total Asia and Oceania ...	49,490	208,703	333,925	499,190	502,526
Other countries	---	2,237	835	2	1,497
Grand total	22,100,936	22,332,517	24,480,182	23,835,079	22,822,316

1/ Revised.

2/ Preliminary.

3/ 132.276 pounds each.

Foreign Agricultural Service. Compiled from official records of the Bureau of the Census.

GREEN COFFEE: U.S. gross imports for consumption by months, 1960-1964

Calendar year	1960	1961	1962	1963 ^{1/}	1964 ^{2/}
	Bags ^{3/}	Bags ^{3/}	Bags ^{3/}	Bags ^{3/}	Bags ^{3/}
January	1,231,918	1,951,110	2,294,540	1,241,088	1,977,276
February	2,148,092	1,715,463	2,310,778	2,238,665	1,969,568
March	2,021,836	2,234,714	1,828,026	2,157,406	2,476,132
April	1,643,136	1,771,045	1,859,220	2,245,754	2,459,757
May	1,815,797	1,719,310	2,006,712	1,797,858	1,597,003
June	1,899,318	2,044,567	1,550,237	1,332,142	1,343,896
January - June	10,760,097	11,436,209	11,849,513	11,012,913	11,823,632
July	1,625,133	1,633,002	1,678,724	1,956,858	1,552,377
August	2,031,009	1,775,779	2,003,959	1,887,944	1,428,029
September	1,962,691	1,864,476	2,074,355	2,166,907	1,659,684
October	2,066,741	1,934,063	2,074,786	2,486,099	1,960,222
November	1,827,269	1,604,276	2,256,432	2,181,114	2,329,666
December	1,827,996	2,084,712	2,542,413	2,143,244	2,068,706
July - December ...	11,340,839	10,896,308	12,630,669	12,822,166	10,998,684
January - December :	22,100,936	22,332,517	24,480,182	23,835,079	22,822,316

Fiscal year	1960-61	1961-62	1962-63	1963-64	1964-65
July - December ...	11,340,839	10,896,308	12,630,669	12,822,166	10,998,684
January - June	11,436,209	11,849,513	11,012,913	11,823,632	---
July - June	22,777,048	22,745,821	23,643,582	24,645,798	---

^{1/} Revised.

^{2/} Preliminary.

^{3/} 132.276 pounds each.

United States Bureau of Census.

GREEN COFFEE: U.S. consumption and net imports, annual 1961-64

Calendar year	: 1961	: 1962	: 1963	: 1964 ^{1/}
	: Mil. bags	: Mil. bags	: Mil. bags	: Mil. bags
January-June:	: <u>2/</u>	: <u>2/</u>	: <u>2/</u>	: <u>2/</u>
Total consumption	: 11.2	: 11.3	: 11.3	: 12.0
Net stock change	: - .1	: + .2	: - .5	: - .5
Net imports	: <u>11.1</u>	: <u>11.5</u>	: <u>10.8</u>	: <u>11.5</u>
July-December:	:	:	:	:
Total consumption	: 11.1	: 11.3	: 11.3	: 10.4
Net stock change	: - .3	: +1.0	: +1.3	: + .3
Net imports	: <u>10.8</u>	: <u>12.3</u>	: <u>12.6</u>	: <u>10.7</u>
Calendar year:	:	:	:	:
Total consumption	: 22.3	: 22.6	: 22.6	: 22.4
Net stock change	: - .4	: +1.2	: + .8	: - .2
Net imports	: <u>21.9</u>	: <u>23.8</u>	: <u>23.4</u>	: <u>22.2</u>

Fiscal year summary	: 1960-61	: 1961-62	: 1962-63	: 1963-64
Total consumption	: 22.2	: 22.4	: 22.6	: 23.3
Net stock change	: + .2	: - .1	: + .5	: + .8
Net imports	: <u>22.4</u>	: <u>22.3</u>	: <u>23.1</u>	: <u>24.1</u>

^{1/} Preliminary. ^{2/} 132.276 pounds each.

NOTE: Total consumption: Civilian and military disappearance, plus manufactured coffee for consumption.
Net stock change: Green coffees, except imports not yet entered for consumption.
Net imports: Total receipts from territories and imports into continental United States minus exports and re-exports.

GREEN COFFEE: U. S. gross imports by country or area of origin

Area of origin	Average		1961		1962		1963 ^{1/}		1964 ^{2/}	
	Mil.	Per-	Mil.	Per-	Mil.	Per-	Mil.	Per-	Mil.	Per-
	bags	cent	bags	cent	bags	cent	bags	cent	bags	cent
Brazil	8.91	42	8.57	39	9.09	37	9.27	39	7.21	31
Africa and Asia	2.86	14	4.79	21	5.43	22	5.56	23	6.57	29
Mild coffees:										
Colombia	4.54	22	4.08	18	4.33	18	3.94	17	3.70	16
Other South America84	4	.97	4	1.15	5	1.13	5	1.08	5
Mexico and Central America	3.30	15	3.58	16	3.91	16	3.41	14	3.57	16
Caribbean55	3	.34	2	.57	2	.53	2	.69	3
Total milds	9.23	44	8.97	40	9.96	41	9.01	38	9.04	40
Total world	21.00	100	22.33	100	24.48	100	23.84	100	22.82	100

^{1/} Revised.

^{2/} Preliminary.

^{3/} 132.276 pounds each.

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